



How to Systematically Improve Your Sales Process: A Step-by-Step Guide



As famed professor and business consultant Edward Deming once said, "If you can't describe what you're doing as a process, you don't know what you are doing."

If this concept alone doesn't resonate, consider the fact that research shows that having a formalized sales process in place leads to:

- An [18% difference](#) in revenue growth
- A [65% boost](#) in reps hitting their targets
- An [88% increase](#) in companies hitting quota

A good sales process is the foundation of any successful sales organization. And just like in construction, if you don't have a solid foundation, none of the other pieces (reps, tools, strategies, etc.) that you put into place will stand for long.

Not only does a sales process give reps strategic step-by-step instructions and tasks to move prospects from one stage of the sales pipeline to the next, but by establishing a common language and set of expectations, it also ensures that managers are working with the appropriate quantity and quality of data needed to yield meaningful insights.

While most companies have some semblance of a sales process in place, they often fail to formalize it and enforce compliance across the organization.

Equally devastating is the frequent failure to optimize and refine these sales processes over time; it's extremely important to remember that the sales process is a living, breathing playbook that should be consistently updated as you discover what drives the most revenue for your business.

Along with its accompanying exercise sheet, this guide will take you on a step-by-step journey of how to systematically optimize and improve your sales process to strengthen the foundation of your sales organization - and, of course, close more deals.

Only 51% of surveyed sales organizations use a formal step-by-step selling process that guides sales professionals through a variety of sales interactions.

01 Common Sales Process Stumbling Blocks

Not surprisingly, many companies face similar types of challenges when it comes to creating a fully-functional and successful sales process. Let's examine a few common yet critical areas typically in need of some fine-tuning.

Keeping your process buyer-focused.

Too often, companies create sales processes that lay things out the way that they wish they would happen. In reality, a sales process should be reflective of your customer's needs and realistic buying processes - not your needs.

A good example of what can happen when your sales process isn't focused on your buyer comes from ex-sales ops professional and current Zendesk Sell product marketer Lindsey Bly. At a previous company, Lindsey and her team noticed prospects frequently dropping out of a particular pipeline stage. After some analysis, they discovered that the culprit was a request for credit card information that was being sent far too early in the sales process.

Because prospects felt that their "relationship" with the company had not yet progressed to a point where credit information was necessary, they got spooked, lost trust in the process and went dark. Lindsey admits, "If we had waited a stage to do this or added an extra little step to verify our customers' requirements, the overall process would have run a lot smoother."

Take a step back and examine your sales process - could premature requirements be hurting your prospect relationships? Be sure that early stage process steps are focused on identifying needs and defining outcomes, and any major asks are saved for further in the funnel.

Ensuring every scenario has a follow-up action.

Just because someone doesn't answer your call or respond to your email doesn't mean that that opportunity is dead and the deal stops there. Don't leave things open-ended or up for interpretation. Be sure give reps a set list of steps to follow regardless of outcome. If a deal is rejected, define whether it should be placed in a nurture queue or on a do not call list.

Qualifying the right buyers.

Not all leads are created equal, and knowing which to focus on and which to walk away from based on past successes and failures is key. Start paying close attention to the qualities and characteristics that make up your ideal customer profile, such as industry, title, company size and so much more.

Does your sales process feature the questions that you need to ask to identify and build profiles for these buyers? These qualifying steps should be baked into your team's workflow. And of course, make sure that your SFA or sales platform of choice has the fields and functionality necessary to keep track of this information for you.

Knowing when handoffs should occur.

Sometimes certain information and steps can be overlooked if not everyone on the team is 100% sure who owns which parts of the process and how information is transitioned.

Document this information and ensure that your team knows exactly where handoffs between marketing, BDRs, AEs, finance, etc. should occur. For an extra smooth transition, take this a step further by defining how these handoffs should take place and where historical information and context should be stored.

A recent study by [SiriusDecisions](#) found that organizations with a formal stage in their lead management process signaling the handoff from marketing to sales generated twice as many wins per 1,000 inquiries compared to other companies.

Focusing on the most impactful part of the sales funnel.

Of course, everyone in sales is most excited about what comes at the end of the sales pipeline: revenue. But as tempting as it may be, avoid zeroing in on the bottom of the sales funnel. Your deals will never get there if you don't optimize the top and middle of your funnel first!

Dig into your process in the early and middle stages to identify and define the activities that ultimately push deals further down the pipe toward these closing stages. Once you have things like ideal qualifying questions and demo scripts in a good place, then you can start diving into later-funnel items, like your best customer references and tactics for receiving that verbal yes.

02 Refining Your Sales Process

Printing out and using the exercise sheet that accompanied this eBook, let's get started refining your sales process in a more detailed and systematic manner. You will also need your SFA or sales system of record.

Step one:

In the small boxes at the top of the first page of the exercise, enter the stages of your sales pipeline. Beneath each of these stages, list the individual steps within your sales process.

Step two:

Choose the last 25 closed deals in your pipeline and enter their company names at the top of each column in a Google or Excel spreadsheet. Highlight those that have been won in green, and those that were

Write your sales pipeline stages in the boxes below.

Prospecting	Accepted	Qualified	Committed	Transacted
List sales process steps:	List sales process steps:	List sales process steps:	List sales process steps:	List sales process steps:
_____	_____	_____	Schedule a reference call	_____
_____	_____	_____	Send 3 case studies	_____
_____	_____	_____	Evaluate discounts	_____
_____	_____	_____	Get verbal "yes"	_____
_____	_____	_____	Provide detailed pricing	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Step three

Next, in the far-left column of the spreadsheet, create a list of key questions to analyze attributes and steps in each deal. These questions should be aimed at helping you identify features of both successful and not so successful deals.

- What was the time to first outreach?
- Was first contact made via phone or email?
- Which reps were assigned the deals?
- What competitors/other solutions were the prospects considering?
- Was a customer reference provided? If so, which one?
- How many decision makers were ultimately identified?

While this list will vary depending on your sales pipeline, target market and business requirements, here are some examples of meaningful questions that you can ask to dig deeper into your sales process and performance:

- How soon was an on-site meeting held?
- What, if any, marketing materials were sent?
- How much time was spent in each stage of the sales pipeline?
- If lost, at what stage did the deal close? • If lost, what were the deal loss reasons?

Step four

Take the time to answer these questions in your spreadsheet, and then start comparing and contrasting your responses across won and lost deals. You should be able to identify both a few obvious areas for improvement, as well as some follow-up questions to dig deeper into certain issues.

Note: Remember that one major function of your sales process is to ensure the consistent and complete capture of data needed to properly evaluate and optimize performance. The questions you chose are indicative of these key data points. As such, if you were unable to answer some of your questions, this in and of itself indicates areas of your process that should be refined.

Step five

Select three of the areas you have identified for improvement, and go back to your sales process exercise sheet. What changes can you make to these steps to drive change? On page two of the exercise, map out your sales process once more, but this time, add, alter or remove steps as needed to address these three target areas.

Remember that when you begin to actually apply these changes to your sales process, to do so one step at a time for attribution purposes. Of course, to find out whether these changes will get you the result that you're looking for will require some additional analysis and testing over time.

Keep in mind that there could be many reasons why you are noticing certain patterns in your sales performance. However, for the purposes of this exercise, we are assuming that those you have identified are tied directly to the sales process.

03 Sample Scenarios

To help give you an idea of the types of insights you may uncover through this exercise and the corresponding actions you might take, let's examine a few sample scenarios.

Scenario One:

What you see: There is a higher connect rate when first outreach is made via email versus phone.

What this could mean: Email may potentially be a better channel for your business.

What you should do:

Add a step in your process specifying that reps must email prospects within 30 minutes of receiving a lead.

Scenario Two:

What you see: Deals that sit for longer than a week in a particular stage are won only half as often as deals that are in this stage for less than a week.

What this could mean: There may be something missing in your sales process that helps address a particular concern of some prospects at this stage.

Try including scheduling an on-site meeting as a process step for this pipeline stage. This will give your team a better chance of making a connection with these prospects and addressing any concerns they may have before it's too late. Over time, you may even discover a particular set of recurring objections that you can insert a step to combat earlier in your sales process.

Scenario 3:

What you see: When a customer is considering you alongside a certain competitor, you tend to lose out.

What this could mean: Your team may not be properly positioning themselves against this competitor.

What you should do: Issue the creation of marketing collateral comparing your product offering against this particular competitor. Then, include a step to distribute this document in your process.

Facilitating Sales Process Improvement

Companies that fail to make sales process management a priority face productivity and performance roadblocks, as well as miss out on data-driven insights and improvement opportunities.

Choosing a sales platform that facilitates your sales process and makes it easy to optimize your team's workflows is critical.

To learn more about how **Zendesk Sell** can help your business systematically improve your sales process,

visit zendesk.com/sell
or call us at (855) 964-1010.

